

**State of Michigan
Civil Service Commission**

Position Code

POSITION DESCRIPTION

This position description serves as the official classification document of record for this position. Please complete the information as accurately as you can as the position description is used to determine the proper classification of the position.

2. Employee's Name (Last, First, M.I.)	8. Department/Agency TREASURY CENTRAL PAYROLL
3. Employee Identification Number	9. Bureau (Institution, Board, or Commission) OFFICE OF REVENUE AND TAX ANALYSIS
4. Civil Service Position Code Description Financial Specialist-2	10. Division REVENUE SHARING AND GRANTS DIVISION
5. Working Title (What the agency calls the position) FINANCIAL SPECIALIST 13	11. Section REVENUE SHARING SECTION
6. Name and Position Code Description of Direct Supervisor SARLES, JUANITA L; STATE ADMINISTRATIVE MANAGER-1	12. Unit
7. Name and Position Code Description of Second Level Supervisor COLE, EVAH M; STATE DIVISION ADMINISTRATOR	13. Work Location (City and Address)/Hours of Work 430 W. ALLEGAN, LANSING, MI 48922 / MONDAY - FRIDAY, 8 AM TO 5 PM

14. General Summary of Function/Purpose of Position

This position serves as the department's specialist in the administration of the Emergency 911 program, the Convention Facility Development program, the Health & Safety program, the Indigent Health program and the Small Business Taxpayer Exemption program. These programs are substantial and critical for State of Michigan local units of government. This position works within general policies and procedures and provides expert knowledge related to the various programs administered including all accounting related functions. These programs require a deep understanding of revenue accounting, the State's accounting system (SIGMA) and Business Intelligence. The primary functions of this position include duties pertaining to administering the programs including researching, interpreting, and analyzing program policies and procedures; monitoring and summarizing state legislative changes related to the programs; analyzing revenues and developing program distributions; developing reports; responding to complex inquiries; attending and making presentations at meetings; handling programmatic matters; assisting in the development of policies and procedures; conducting meetings with senior and support staff; and implementing special projects.

This position works with the State Budget Office, other state departments, House and Senate Fiscal Agencies, cities, villages, townships, counties, bond attorneys, various special interest groups, and other areas of the department.

Responsibilities include producing estimates of the effects of proposed policy changes on the state's local governments, calculating payments, analyzing state budget and accounting reports to ensure the programs are accounted for properly, and making changes to the computer model which calculates the payments. These grant programs require a high level of revenue accounting knowledge, including SIGMA and Business Intelligence.

15. Please describe the assigned duties, percent of time spent performing each duty, and what is done to complete each duty.

List the duties from most important to least important. The total percentage of all duties performed must equal 100 percent.

Duty 1

General Summary:

Percentage: 50

This position serves as the lead specialist for the Emergency 911 program. This includes researching, interpreting, and analyzing program policies and procedures; monitoring and summarizing state legislative changes; developing reports; responding to complex inquiries; handling programmatic matters; assisting in the development of policies and procedures; conducting meetings with senior and support staff; and implementing special projects. This position requires the creation and maintenance of detailed documentation and the ability to provide the Office of the Auditor General thorough records.

Individual tasks related to the duty:

- Formulates procedures, policies, and guidelines for the Emergency 911 program.
- Develops program goals and implementation plans and coordinates administrative activities to meet those goals/plans.
- Writes, reviews, and interprets complex legislative bills pertaining to the program and makes recommendations, to the Division Administrator, accordingly.
- Analyzes and evaluates legislative bill proposals for their potential program and fiscal implications and recommends disposition.
- Analyzes information and data in order to prepare budgetary projections related to the Emergency 911 program.
- Maintains detailed program records, prepares reports and correspondence relating to the program.
- Responds to complex program questions/inquiries (both verbally and in writing) from special interest groups, the legislature, local units of government, the State Budget Office, and other areas within Treasury.
- Develops Emergency 911 program payment methodology.
- Develops programing logic for the Revenue Sharing and Personal Property Tax (RSPPT) system to accurately calculate and distribute program payments.
- Develops and maintains a specialist level understanding of the Revenue Sharing and Personal Property Tax (RSPPT) system. Trains other division staff as needed.
- Performs quarterly SIGMA accounting/financial reconciliation of the various Emergency 911 program funds (Local Exchange Providers; County Equal; County Per-Capita and Public Safety Answering Points (PSAP), including appropriations, expenditures, revenues etc...).
- Researches, reviews, and evaluates, current processes to address areas of improvement regarding SIGMA issues.
- Summarizes complex data, compiles information, and prepares various annual reports related to the Emergency 911 program.
- Develops and maintains the Emergency 911 website.
- Acts as the Liaison with the Auditor General's Office. Researches program information and accounting records and provides data to the Auditor General's Office. Responds to auditor inquiries as they arise.
- Identifies and recommends program enhancements and improvements, and as approved, implements program enhancements and improvements.
- Maintains specialist level of understanding of Business Intelligence queries; modifying/maintaining existing queries and developing new queries to extract financial transaction detail in SIGMA for tracking expenditures and developing reports. Trains other division staff as needed.
- Monitors appropriations/funds for the program.
- Prepares program budgetary needs and prepares requests for legislative appropriations, transfers, and supplemental appropriations.
- Provides financial, analytical, and reporting for the Emergency 911 program.
- Establishes SIGMA financial accounting profile structure requirements for the program.
- Conducts special projects, studies, and analysis relating to the Emergency 911 program.
- Serves as a technical advisor and liaison with local units of government, special interest groups, the state budget office, other state agencies, and other areas within Treasury.
- Summarizes Financial Data and Develops reports related to the program for the State 911 Committee and the Michigan Department of State Police.
- Assists in the development of a new Emergency 911 department wide system.
- Reviews and analyzes intent, scope, and impact of programmatic initiatives and polices.
- Conducts meetings with senior and support staff.

Duty 2

General Summary:

Percentage: 40

This position serves as the lead specialist for the Convention Facility Develop Fund program, the Health and Safety Fund program, the Indigent Health program and the Small Business Taxpayer Exemption program.

This includes researching, interpreting, and analyzing program policies and procedures; monitoring and summarizing state legislative changes developing reports; responding to complex inquiries; handling programmatic matters; assisting in the development of policies and procedures; conducting meetings with senior and support staff; and implementing special projects. This position requires the creation and maintenance of detailed documentation and the ability to provide the Office of the Auditor General thorough records.

Individual tasks related to the duty:

- Formulates procedures, policies, and guidelines for the Convention Facility Develop Fund program, the Health and Safety Fund program, the Indigent Health program and the Small Business Taxpayer Exemption program.
- Develops program goals and implementation plans and coordinates administrative activities to meet those goals/plans for each program.
- Writes, reviews, and interprets complex legislative bills pertaining to the programs and makes recommendations, to the Division Administrator, accordingly.
- Analyzes and evaluates legislative bill proposals for their potential program and fiscal implications and recommends disposition (for each program).
- Analyzes information and data in order to prepare budgetary projections related to the Convention Facility Develop Fund program, the Health and Safety Fund program, the Indigent Health program and the Small Business Taxpayer Exemption program.
- Maintains detailed program records, prepares reports and correspondence relating to the programs.
- Responds to complex program questions/inquiries (both verbally and in writing) from special interest groups, the legislature, local units of government, bond attorneys, the State Budget Office, and other areas within Treasury.
- Develops Convention Facility Develop Fund program, Health and Safety Fund program, Indigent Health program and Small Business Taxpayer Exemption program payment methodology.
- Develops programing logic for the Revenue Sharing and Personal Property Tax (RSPPT) system to accurately calculate and distribute program payments.
- Develops and maintains a specialist level understanding of the Revenue Sharing and Personal Property Tax (RSPPT) system. Trains other division staff as needed.
- Performs quarterly SIGMA accounting/financial reconciliation of the various programs' funds, including appropriations, expenditures, revenues etc...
- Researches, reviews, and evaluates, current processes to address areas of improvement regarding SIGMA issues.
- Summarizes complex data, compiles information, and prepares various annual reports related to the programs.
- Develops and maintains the Convention Facility Develop Fund program, the Health and Safety Fund program, the Indigent Health program and the Small Business Taxpayer Exemption program websites.
- Acts as the Liaison with the Auditor General's Office. Researches program information and accounting records and provides data to the Auditor General's Office. Responds to auditor inquiries as they arise.
- Identifies and recommends program enhancements and improvements, and as approved, implements program enhancements and improvements.
- Maintains specialist level of understanding of Business Intelligence queries; modifying/maintaining existing queries and developing new queries to extract financial transaction detail in SIGMA for tracking expenditures and developing reports. Trains other division staff as needed.
- Monitors appropriations/funds for each of the programs.
- Prepares program budgetary needs and prepares requests for legislative appropriations, transfers, and supplemental appropriations.
- Provides financial, analytical, and reporting for the programs.
- Establishes SIGMA financial accounting profile structure requirements for the programs.
- Conducts special projects, studies, and analysis relating to the Convention Facility Develop Fund program, the Health and Safety Fund program, the Indigent Health program and the Small Business Taxpayer Exemption program.
- Serves as a technical advisor and liaison with local units of government, special interest groups, the state budget office, other state agencies, and other areas within Treasury.
- Summarizes Financial Data and Develops reports for bond documents.
- Reviews and analyzes intent, scope, and impact of programmatic initiatives and policies.
- Conducts meetings with senior and support staff.

Duty 3

General Summary:

Percentage: 10

Special Projects as assigned.

Individual tasks related to the duty:

- Presidential Primary Payments to local units of government.
- Participates in activities that contribute to the achievement of the mission, goals and operational objectives of the Revenue Sharing and Grants Division, Office of Revenue and Tax Analysis.
- Special projects as assigned.

16. Describe the types of decisions made independently in this position and tell who or what is affected by those decisions.

Answering complex questions regarding the programs administering. Decisions regarding how to manage the reconciliation of the various program funds to SIGMA and review of the various year-end transactions processed. Decisions related to the development of procedures and the development and maintenance of the program websites. Developing programming logic for the Revenue Sharing and Personal Property Tax (RSPPT) system for payment distributions. Decisions related to analyzing potential changes to the statutes and producing and interpreting complex legislative language.

17. Describe the types of decisions that require the supervisor's review.

Reports and legal documents prepared by this position for the Treasury Executive Office or for public viewing require final approval of the supervisor/Division Director. Policy and/or major procedural changes require supervisor/Division Director approval prior to implementation. The final release of changes to public acts and major reports. Responses to questions that may be politically sensitive. Policy interpretation/decisions are discussed when the scope of the decision is such that supervisory review/confirmation is appropriate.

18. What kind of physical effort is used to perform this job? What environmental conditions in this position physically exposed to on the job? Indicate the amount of time and intensity of each activity and condition. Refer to instructions.

This position mainly involves physical effort and conditions generally found in an office environment, including sitting at a workstation and working on a computer. Position requires working in a high-pressure environment with strict work deadlines. Extended work hours may be required.

19. List the names and position code descriptions of each classified employee whom this position immediately supervises or oversees on a full-time, on-going basis.

Additional Subordinates

20. This position's responsibilities for the above-listed employees includes the following (check as many as apply):

<input type="checkbox"/> N	Complete and sign service ratings.	<input type="checkbox"/> N	Assign work.
<input type="checkbox"/> N	Provide formal written counseling.	<input type="checkbox"/> N	Approve work.
<input type="checkbox"/> N	Approve leave requests.	<input type="checkbox"/> N	Review work.
<input type="checkbox"/> N	Approve time and attendance.	<input type="checkbox"/> N	Provide guidance on work methods.
<input type="checkbox"/> N	Orally reprimand.	<input type="checkbox"/> N	Train employees in the work.

22. Do you agree with the responses for items 1 through 20? If not, which items do you disagree with and why?

Yes

23. What are the essential functions of this position?

This position serves as the specialist in Treasury for the Emergency 911 program, the Convention Facility Develop Fund program, the Health and Safety Fund program, the Indigent Health program and the Small Business Taxpayer Exemption program. All tasks require substantive levels of responsibility. Essential functions include all the requirements listed in Section 15 of the position description.

24. Indicate specifically how the position's duties and responsibilities have changed since the position was last reviewed.

New Position

25. What is the function of the work area and how does this position fit into that function?

The Bureau of the Office of Revenue and Tax Analysis (ORTA) is responsible for economic forecasts and revenue estimates for use in the State budget process; revenue tracking and tax economic policy analysis; coordination of the semi-annual consensus revenue estimating conferences; administration of the State Revenue Sharing programs; the Personal Property Tax Reimbursement program; the Financially Distressed City, Village and Township grant program; the Emergency 911 program; the Convention Facility Develop Fund program; the Health and Safety Fund program; the Indigent Health program, the Small Business Taxpayer Exemption program; and various other special grant programs of the Department.

This position is responsible for the Emergency 911 program, the Convention Facility Develop Fund program, the Health and Safety Fund program, the Indigent Health program and the Small Business Taxpayer Exemption program.

The position requires a broad and detailed knowledge of the State's accounting system, mastery of spreadsheet software, and familiarity with Treasury's computing systems. The position also requires the ability to manage complex projects, complete work under tight deadlines, and the ability to work effectively with staff within Treasury and from a number of different state agencies.

26. What are the minimum education and experience qualifications needed to perform the essential functions of this position.

EDUCATION:

Possession of a bachelor's degree in any major with at least 12 semester (18 term) credits in one or a combination of the following: accounting, finance, or economics.

EXPERIENCE:

Financial Specialist 13 - 15

Four years of professional experience equivalent to a Financial Analyst; including two years equivalent to a Financial Analyst P11, Accountant P11, or Auditor P11 or one year equivalent to a Financial Analyst 12, Accountant 12, or Auditor 12.

KNOWLEDGE, SKILLS, AND ABILITIES:

Knowledge of the operational and technical problems involved in the administration of specialized programs. Knowledge of methods of planning, developing, and administering programs. Knowledge of state and federal laws and legislative processes related to the work. Knowledge of the need, preparation, and use of reports. Ability to plan, direct, and coordinate programs and administrative activities of a highly complex, interrelated and interdependent nature, where unknowns and numerous contingency factors are involved. Ability to formulate policies and procedures relevant to program areas based on information of a conceptual nature from varied and complex sources. Ability to plan, coordinate, and expedite work projects. Ability to quickly assimilate a variety of oral and written data to analyze facts and draw logical conclusions, collect and interpret information, apply criteria, and make recommendations to management. Ability to interpret complex rules and regulations. Ability to communicate with a variety of people under varied conditions both verbally and in writing.

Strong analytic skills and knowledge of state revenues. Ability to work independently with limited supervision as well as part of a team, be well organized, project a professional image and foster positive employee and team relations.

This position requires knowledge of the State's accounting system, state tax laws, mastery of spreadsheets and PC based databases. In addition, a strong background in accounting and/or economics is desirable. Experience with EXCEL, ACCESS, and SIGMA and Business Intelligence is also highly desired.

CERTIFICATES, LICENSES, REGISTRATIONS:

None

NOTE: Civil Service approval does not constitute agreement with or acceptance of the desired qualifications of this position.

I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.

Supervisor

Date

TO BE FILLED OUT BY APPOINTING AUTHORITY

Indicate any exceptions or additions to the statements of employee or supervisors.

N/A

I certify that the entries on these pages are accurate and complete.

SALLY VAN VYVE

6/18/2024

Appointing Authority

Date

I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.

Employee

Date